

FundsNetwork: an adviser experience

Over time, we've been making changes to enhance our service and deliver great value where we can. In fact, you'll find plenty of information about this across our site. But we're not the only experts you should listen to. We've also had a range of **feedback from advisers, paraplanners and administrators** alike – here's just some of what they had to say.

Committed service and an effortless experience

Whether it's managing client assets or support for you and your business, our team is here for you. Let's see how advisers have found working with us so far.

When I had an issue, Stacey on the Adviser Helpline assisted me and she was absolutely brilliant – superstar!

I'm still quite new so I'm still learning. When I called, I spoke to David who guided me through the steps and helped boost my confidence.

I couldn't perform a task on my own, so I called up and was really pleased with the excellent support I received from Fidelity over the phone.

Continuous improvement

Of course, the changes we've made so far are just the beginning, and we'll continue to amend and improve our systems and processes. Advisers like you are at the heart of everything we do, so we'll endeavour to look forward and make progress.

There has been such an improvement recently and my experience has been far better than previous years.

The system is certainly much better than before – excellent.

I say keep the improvement going. What I've seen so far is great, so I'll be interested to see what the future holds.

Smart functionality

Our platform, as well as the sophisticated tools we offer, have all been designed to help you with your day-to-day business – allowing you to manage and move with ease. What is it about our platform advisers love?

I needed to generate a pension quote and was able to do so intuitively without having to call for help – well done!

The site had everything needed for a general annual review meeting with my client and everything was easy to find.

The website is so simple to follow – and the task I needed to complete was as easy as just pressing a button.

Reporting suite

In total, we offer over 30 reporting options, so you can access detailed information about your clients and their investments. We're very proud of our reporting suite, and it seems advisers are happy with our enhancements too.

Since the reporting capability has been enhanced, it's so much easier to get the client reports I need.

Reports generated are clear and concise. And the functionality around each one is quite intuitive.

Each report has a really great summary, and a lot of the calculations are done for you, which is great.

